



WINGED KEEL GROUP®

CAREERS

Position Title: Client Services and Reporting Intern

Office Location: New York

Reports to: Christian Lysinger, Director

Firm Summary:

Winged Keel Group is an independent life insurance brokerage firm that creates and implements tax-efficient, multi-generational wealth accumulation and wealth transfer strategies for ultra-high net worth families. With offices in Boston, Houston, New York, Richmond, San Francisco, and Washington, D.C., the firm specializes in the structuring and administration of large blocks of Traditional Life Insurance and large portfolios of Private Placement Variable Life Insurance and Annuities.

Position Summary:

Seeking a diligent, conscientious, and detailed oriented student who can commit to a 6-month internship designed to support our Client Services & Reporting department starting March 1st. This department focuses on delivering the highest quality, first class service to our ultra-high-net-worth clients. Offering a suite of services that range from customized reporting, premium invoicing, task management, or the preparation of client life insurance portfolio reviews, the root of this department stems from a disciplined approach towards servicing and monitoring the performance of our client portfolios.

Excellent opportunity to expand your skill set in a fast-paced, entrepreneurial environment. Must be dedicated, reliable, and proactive with a strong willingness to learn and grow.

Position Responsibilities:

- Provide support with compliance forms, project tracking, and file organization
- Ensure the timely delivery of reports by maintaining excellent task management and prioritization skills, while working closely with insurance companies and colleagues
- Update and organize fund information
- Upload or manually enter fund data into reporting database
- Provide assistance with project work and miscellaneous administrative tasks (e.g. copying, scanning, data entry)

Ideal Candidate Will Possess the Following:

- Pursuing a Bachelor's degree
- Highly detailed oriented with a strong ability to organize and prioritize
- Proficiency in Microsoft Office, especially MS Outlook and Excel
- Strong Excel background a plus
- Reliable and committed to a 6-month internship assignment



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- Must be available to intern 20 hours per week
- Comfortable working from the office
- Effective communication and interpersonal skills / team player
- Must be proactive and take initiative with strong follow through
- Positive, can-do attitude

To apply, please contact:

Nicole Harrington

Managing Director, People & Culture

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